DOCUMENT RESUME

ED 151 984 EA 010 487

AUTHOR Martin, George B.
TITLE Suggested Calendar of Yearly School Board Activities 1977-1978.
INSTITUTION Oregon State Dept. of Education, Salem.
PUB DATE Aug 77
NOTE 31p.

EDRS PRICE MF-$0.83 HC-$2.06 Plus Postage.
DESCRIPTORS Board of Education Policy; Board of Education Role; *Boards of Education; *Budgeting; Collective Bargaining; Elementary Secondary Education; *Meetings; Personnel Policy; *Scheduling; *School Districts; School District Spending; State Legislation; *State School District Relationship
IDENTIFIERS *Oregon

ABSTRACT

The materials contained in this school board calendar are intended to help local boards take the appropriate actions required by the state of Oregon at the appropriate times. Many of these board actions involve budget preparation and approval, collective bargaining, and personnel procedures. The calendar suggests activities based on the timeline of regular monthly board meetings, suggests possible school board policy, and presents model forms of resolutions or other types of board action. (Author)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

ED151984

SUGGESTED PERSONNEL POLICY GUIDELINES FOR SCHOOL DISTRICTS

U S DEPARTMENT OF HEALTH, EDUCATION & WELFARE
NATIONAL INSTITUTE OF EDUCATION

THIS DOCUMENT HAS BEEN REPRODUCED EXACTLY AS RECEIVED FROM THE PERSON OR ORGANIZATION ORIGINATING IT. POINTS OF VIEW OR OPINIONS STATED DO NOT NECESSARILY REPRESENT OFFICIAL NATIONAL INSTITUTE OF EDUCATION POSITION OR POLICY

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY

Oregon State Dept. of Educ.

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC) AND USERS OF THE ERIC SYSTEM."

SUGGESTED CALENDAR OF YEARLY SCHOOL BOARD ACTIVITIES 1977-1978

MANAGEMENT SERVICES DIVISION
OREGON DEPARTMENT OF EDUCATION
942 LANCASTER DRIVE N E
SALEM, OREGON 97310
VERNE A. DUNCAN, STATE SUPERINTENDENT OF PUBLIC INSTRUCTION

EA 010 487

SUGGESTED CALENDAR OF YEARLY SCHOOL BOARD ACTIVITIES

1977

Verne A. Duncan
State Superintendent of Public Instruction

Milt Baum
Associate Superintendent
Management Services Division

Don Kipp
Director
Accreditation, Legal and Personnel Services

OREGON DEPARTMENT OF EDUCATION
942 Lancaster Drive NE
Salem, Oregon 97310

STATEMENT OF ASSURANCE

Oregon Department of Education

It is the policy of the Oregon Department of Education that no person be subjected to discrimination on the basis of race, national origin, religion, sex, age, handicap, or marital status in any program, service, or activity for which the Oregon Department of Education is responsible. The Department will comply with the requirements of state and federal law concerning nondiscrimination and will strive by its actions to enhance the dignity and worth of all persons.

First Edition
June 1974
Revised Edition
August 1976

1977-78 Edition
August 1977

257741977500
254081977250

FOREWORD

Suggested Calendar of Yearly School Board Activities was first developed in response to action by the Oregon Legislature, 1973 session. The calendar is now revised annually to bring it up to date and to add new requirements and reports. The purpose of this document is to help local school district boards and administrators identify and follow timelines for required and other district action.

School district boards and administrators should review the content of this publication with extreme care. This should be done to become acquainted with the contents and to set the dates that best suit the calendar of school district events for the coming year. While board members have some choice of activities, they will find that most of the actions outlined are required.

Considerable effort has been directed to the development of this document and to others mentioned in it. Commendation is due to Dr. George B. Martin who prepared both the original and the revised editions in cooperation with Oregon Department of Education staff members. All materials were originally reviewed and approved by the Personnel Management Advisory Committee of the Oregon Department of Education. Our sincere thanks are extended to those who shared in the preparation of these guidelines.

Verne A. Duncan
State Superintendent of
Public Instruction

Personnel Management Advisory Committee Members

1977 - 78

Eugene Allison	Intermediate Education District
Milt Baum	Oregon Department of Education
Joe Benninghoff	Oregon Association of School Personnel Administrators
Al Bigler	Oregon School Employees Association
Cliff Brush	Oregon Federation of Teachers
Chris Dudley	Oregon School Boards Association
Francis Dummer	District Superintendent
Henry Hall	Assistant Superintendent
Gerald Hamann	Metro Districts
John Heilbronner	Oregon Association of Classroom Teachers
Mary Henderson	Portland
Curt Huey Chairperson	Lower Mid-Willamette Valley
Don Kipp	Oregon Department of Education
Jack Liles	Oregon Community College Assembly
George Martin	Oregon Department of Education
Henry Mascall	Teacher Standards and Practices Commission
Tony Palermini Vice Chairperson	Metro Districts
Duffy Tripp	Mid-Willamette Valley
Lee Wells	Oregon Department of Education

Special Assistant and Editor

George Martin

TABLE OF CONTENTS

	Page
Foreword	i
Personnel Management Advisory Committee Members	ii
July Meeting	1
August Meeting	4
September Meeting	7
October Meeting	8
November Meeting	9
December Meeting	10
January Meeting	12
February Meeting	13
March Meeting	14
April Meeting	15
May Meeting	17
June Meeting	17
July Meeting	18
Guidelines for Action	20
Budget Law Calendar	21
School Board Timetable	22

INTRODUCTION

The following materials have been prepared to help local school district boards take required and/or suggested action on a timely basis. Much of the detail that is found below deals with budget preparation and approval, collective bargaining and fair dismissal procedures. In addition, there are also matters that relate to affirmative action, equal educational opportunity and other events and reports important to the management of a school district in Oregon. The materials include suggested activities based on the timeline of regular board meetings, possible school board policy, and model forms of resolutions or other types of board action. NOTE: These suggestions are not totally applicable to intermediate education districts (IEDs), community colleges, or the Portland area districts.

A district board will want to establish actual meeting dates at the start of each school year. These dates should be based on the regular board meeting days for that district. The guidelines that follow assume there will be one board meeting a month, that the required legal notices will appear in local weekly newspapers published on Thursday, that the first day of school is Tuesday following Labor Day, that the annual district election will be held on the first Tuesday in April, April 4, 1978, and that the tax base election is held April 23, 1978.

* * * *

July

The term of new board member(s) commences. Newly elected board members must qualify by taking the oath of office within 30 days of election and before assuming duties. New members may be sworn in using this suggested oath: "I _____, being duly sworn, will support the constitution and the laws of the United States and the State of Oregon, and will discharge the duties of the school district to the best of my ability, so help me, God."

First meeting of the new school year

The meeting should be called to order by the chairperson or vice-chairperson for the previous school year, or another current board member that may be named. The agenda of the meeting, as shown below, is an extension of that found on page three of the Program Budget Manual.[1]

Agenda:

1. Minutes of the last meeting.

---

[1] See Program Budget Manual, A Guide for School Districts, prepared and distributed by the Oregon Department of Education, April 1975. This publication is now in use by Oregon school districts and will be referred to in this publication as Manual.

2. District school board organization and annual procedural business.

   a. Elect board chairperson and vice-chairperson. The superintendent is district clerk by Oregon law. School districts that do not employ a superintendent should name a person to serve as superintendent in order that the fair dismissal process of the district may be properly carried out. The person so appointed will be excused from the State Teacher Standards and Practices Commission requirement of a state certificate and will not be protected by permanent teacher status. (It may be preferable to contract with the IED to provide these services.) The district school board may want to name another party as official clerk for the routine business of the local schools when the board does not employ a superintendent.

   b. Provide for a bond for district clerks and others responsible for handling funds. This will usually be carried out as in previous years. Local IED personnel can provide information if needed.

      (1) Authorize the person(s) to sign district checks. Usually this will be the district clerk and perhaps the school board chairperson. Some districts may wish to require any two out of three authorized signatures.

      (2) Authorize a person to make salary payments according to district budget, policy and state laws. This is usually the district clerk.

   c. Designate the following:

      (1) Regular monthly meeting day(s), time and place, and provide for the immediate and follow-up publication of these dates in local news media, in keeping with state laws. See Discussing Personnel Matters During Board Meetings, Section 1300, page 2.[2]

      (2) The depository(ies) for school funds for the year. Districts that wish to use the "local government investment pool" should contact the State Treasurer.

      (3) The official auditors for the school year.

      (4) The district legal advisor.

   d. Appoint new budget committee members for the vacancies and set terms of office. The number of such people must equal the total number of school board members. Budget committee

---

[2]The school board should be aware of and follow Discussing Personnel Matters During Board Meetings, State Board of Education, February 1974. The board may also wish to adopt policy statements similar to those outlined and/or expand on them as needed for the local district.

members should be appointed for three years and unexpired terms should be filled. The persons appointed must be qualified electors of the district. The responsibilities of the position should be provided in written form to all budget committee members, including the elected school board members. Budget committee members may be informed of the schedule of board meetings, invited to all meetings, given copies of the agenda, and provided with special notice of those items dealing with budget matters.

e. Name the executive officer (usually the district superintendent). Designate the district budget officer (usually the district superintendent or, in larger districts, the business manager or other fiscal officer).

f. Discuss the district board calendar in terms of the requirements of Oregon laws, and the tightness of the timeline. The calendar in this document is based upon the suggested annual calendar prepared and distributed each summer by the Oregon Department of Education. For further details, see Manual, page 4. The details of preparation, approval and use of the district budget is outlined in this publication. Also, see page 13 for a Budget Planning Chart.

3. Old Business:

   a. Determine that the school tax levy has been certified for the current year, or continue to obtain voter approval of the yearly tax levy, if not already accomplished.

   b. Discuss bid openings for matters such as student insurance, food supplies, transportation.

   c. Any other items.

4. Hear reports from board members, staff and public.

5. Approve financial matters: bill payments, bid awards, borrowing authorization and other fiscal matters.

6. New business:

   a. Appoint standing committees of the board or other committees for district activities. Many boards prefer to name ad hoc committees for special and clearly defined tasks. These committees are usually discontinued at the end of the assignment.

b. Discuss personnel changes: resignations, appointments, promotions and other special concerns. Most districts take these actions only for certified employees as required by Oregon law relating to contracts.

c. Any other items. (See below: August Meeting 1.b.)

7. Review district school board policies for and with new board members. Consider changes or additions.

8. Other business.

9. Set time and place of next meeting.

10. Adjourn.

11. Gather data and prepare reports due at the Oregon Department of Education on August 1. (This is not usually an agenda item, but is listed here to alert staff of reports to be prepared.)

NOTE: The above outline of an agenda may be adopted as the regular district form, with the omission of Item #2, which is required only at the start of the school year.

* * * *

August

Aug. 1 Forward by August 1 to the Oregon Department of Education:

1. Form 2249 - Transportation Information.

2. Form 3045 - Basic School Support Fund Application for Small School Correction.

3. Form 3171 - Depreciation Schedule, Garages and Buses.

Meeting. Invite all appointed members of the budget committee to this and all board meetings where budget related matters will be discussed.

1. Consider the following matters:

a. Review current staff assignments for both certificated and classified personnel and the job descriptions for all positions to be sure they accurately describe these assignments.

b. Identify by formal board action, in keeping with current job descriptions:

(1) Confidential employees for collective bargaining.
(2) Supervisory personnel who will be on the management team and who will not be included in staff representation for the bargaining process. See 1973 Guidelines and Model Policies, Second Edition, February 1974, State Board of Education, Section 3520, 4520, page 28, 1.b. This document is referred to in the following pages as Model.

c. Consider a budget calendar in consultation with staff representatives. Review as needed Oregon Local Budget Laws, ORS 294.305 and 294.520. NOTE: Alternative calendars may be developed based upon time annual election.

(1)	Appoint budget committee members.	July meeting
(2)	Consider calendar dates. Provide for possible changes in employee representation. Set dates for such election if required. Set date for first collective bargaining meetings as soon as possible after identification of representatives.	August meeting
(3)	Adopt budget calendar.	September meeting
(4)	Review district educational plan as it involves district budget.	October meeting
(5)	Review and discuss budget estimates and possible personnel changes. Authorize printing of budget.	November meeting
(6)	Review progress in budget building and collective bargaining.	December meeting
(7)	Publish notice of budget committee meeting (not more than 14 nor less than eight days prior to date of meeting (ORS 294.401(1)).	By December 15
(8)	Have work session for new board and budget committee members, if thought necessary.	Prior to December budget committee meeting
(9)	At the first budget committee meeting, elect chairperson and secretary (some districts hold prior meetings of budget committee for organization and orientation), hear budget message, receive budget document, consider comments from citizens and schedule follow-up activities.	By end of December
(10)	Target date for approval of budget by Budget Committee. Dates set for publication and public budget hearing.	By January 26, 1978
(11)	Publish notice of school budget hearing not more than 25 nor less than 15 days prior to hearing.	About February 2, as required
(12)	Make arrangements with the county clerk for the annual district election. See that	By February 7

	required publications are printed and distributed. Designate newspapers which will carry publications.	
(13)	Publish second notice of school budget hearing not more than 14 nor less than eight days prior to the hearing.	About February 9
(14)	Hold board meeting and public hearing on annual budget as approved by budget committee, take special action if needed to amend or alter election dates. (See page 20 for other dates.) Report to election officers by February 27.	About February 23
(15)	Election officer publishes first election notice on levy outside six percent limitation (not more than 25 nor less than 15 days prior to election) in at least three public places (ORS 259.090).	March, as required
(16)	Election officer publishes second annual election notice (not more than 15 days prior to nor later than the date of election. (ORS 259.100(4) as amended by Chapter 301, OL 77.)	April, as required
(17)	County Clerk conducts annual school election.	First Tuesday in April (4)
(18)	Deadline for notifying election officer if the primary election date (May 23, 1978) is selected as provided in House Bill 3156, OL 77.	April 12
(19)	Hold board meeting to canvas election results (ORS 259.200).	By April 19
(20)	Tax base election (Primary election) (ORS 310.402).	May 23
(21)	Adopt annual budget, make appropriations, declare the tax levy.	June meeting
(22)	Certify the levy to county assessor.	By July 15

2. Other August activities:

   a. Plan a proposed calendar for negotiation activities with exclusive representatives. Include an effective date, a reopening date and an expiration date.

   b. Develop procedures to conduct representation elections, if needed, for certificated and classified personnel. If a petition to challenge the present representation or to create a bargaining unit has been received, it should be filed with the Employment Relations Board, 300 Capitol Tower Building, Salem, OR 97310 (378-3807). Most districts will handle employee representation matters in April for the following year.

c. Plan collective bargaining meetings.

d. Consider items board wishes to bring to collective bargaining; identify the process through which the board will be represented; consider persons to represent board (in executive session if desired); set date for first meeting(s) with employee representatives. See Model policies Section 3520/4520, pages 28-30.

e. Set tuition charges for current year.

3. Gather data and prepare reports due September 10 See details below.

* * * *

September

Tuesday following Labor Day (for most districts) First day of school.

Complete and forward to the Oregon Department of Education by this date the following state reports:

Sept. 15 1. Form 3210 - School District Program Financial Accounting Summary. Pre-audit for 1976-77 (copy also to district auditor).

Sept. 30 2. Form 3178 - District report on certificated personnel.

3. Form 3179 - District report on new certificated personnel.

Meeting 1. Review any problems relating to the first days of school.

2. Review and discuss new state or federal legislation and/or Oregon Department of Education rules and procedures that affect the district. (Refer to the Model policies for school board policies.)

3. Discuss and develop at least tentative plans for meeting new laws and regulations and for providing better educational experiences for district children. Assign responsibilities, develop timeline, prepare cost estimates for alternative procedures.

4. Adopt the budget calendar based on the one developed in August, altering it where necessary, to guide the administrative staff in complying with local budget and election laws.

5. Designate newspaper to be used for all legal notices, including notice of election.

6. Verify that all certificated employees have their contract and teaching certificates registered in the administrative office of the county (ORS 342.173 and 342.601).

7. Review the district Equal Employment Opportunity (affirmative action) program to determine that:

   a. District policies reflect present requirements and practices.

   b. The district plan for implementing these policies is current.

   c. There is a summary of protests to the plan or to the manner in which it is implemented, if any protests exist.

   d. An affirmative action officer is appointed or reappointed as necessary.

Other activities

1. Plan for collection of enrollment data by October 1.

2. Gather data and prepare preliminary reports as due October 10 and 15. See following details.

* * * *

October

Oct. 1 Use this, or the nearest possible date, for reporting enrollment data.

Oct. 8 When appropriate, forward copies of fall reports to the IED office by this date:

1. Form 3173 - District Level Fall Report.

2. Form 3174 - School Level Fall Report.

Oct. 10 Forward copies to the Oregon Department of Education by this date:

1. Form 3263 - Report of Membership and Attendance in Private and Parochial Schools in Oregon.

2. Form 3200/3200A - Pupil Personnel Accounting Report - Quarterly.

3. Form 3206 - High School Dropout Report Form - Quarterly.

Oct. 15 IEDs should forward to the Oregon Department of Education copies of the following:

1. Form 3173 - District Level Fall Report.

2. Form 3174 - School Level Fall Report.

Meeting

1. Review and adopt a revised educational plan for the current year; provide for dissemination of the plan to community and staff; determine the fiscal priorities that will guide the development of the annual budget; involve the appointed members of the budget committee in these decisions.

2. Review the progress of collective bargaining.

3. Identify and provide for informing and helping probationary and other certificated staff members who need to improve performance and who are being considered for reemployment. (see ORS 342.835.)

4. Review the district's Equal Educational Opportunity program.

   a. Determine whether all plans and procedures are consistent with district policy and intent and with current laws and court decisions.

   b. Summarize and analyze all grievances filed by students, parents or staff members.

   c. Modify the plan and procedures as found necessary.

   d. Provide and plan for regular reporting of current status.

   e. Appoint or reappoint a staff member as Title IX coordinator.

* * * *

November

Meeting

1. Receive and discuss requests for staffing changes for the following year.

2. Review and discuss proposed budget estimates to date.

3. Grant authorization for the printing of the proposed budget document.

4. Review and amend as needed hearing procedures for:

   a. Providing free lunches and milk.

   b. Student grievances, suspensions and dismissals.

   c. Parent and other grievances on district policies and procedures.

Other activities

Gather data and be prepared for reports due in December. See following details.

* * * *

December

By the second week, the board and employee representatives for both certificated and classified personnel should have reached an agreement on budget related issues. If this is not accomplished, the Employee Relations Board may be notified and requested to name a mediator for not more than 15 days of mediation. Contact Conciliation Service Division, Employment Relations Board, 3850 Portland Road NE, Salem, OR 97303, telephone: 378-6471. Both parties may agree to submit the issues to binding arbitration at any point. This omits or stops the mediation process. (See Model policies, Section 3520, 4520, 5., page 29.)

Meeting

1. Review and act on proposed personnel requests and budget estimates as recommended by the staff. Consider these items in the light of the priorities developed in October.
2. Review procedures for helping warned probationary teachers and informing them of their current status.
3. Consider the staff negotiations progress as it relates to the budget calendar and planned election.
4. Review personnel policies to be sure they meet current needs and are consistent with collective bargaining agreement. (This may also be needed at the time agreements are reached.)

Other activities

1. Forward these reports to the Oregon Department of Education by December 15:
   a. Form 3046/3046A - Estimate of Expenditures and Receipts, for use in Basic School Support Fund estimates.
   b. Form 3047 - Estimated Receipts from the County and Common School Funds for use in Basic School Support Fund estimates. (Completed by IEDs and County School Districts.)
2. Obtain the district Annual Audit Report by December 31 and distribute it to board members and others, including state agencies as required.
3. Gather data and be prepared for reports due in January. See following.

On or about Dec. 15

Publish NOTICE OF BUDGET COMMITTEE MEETING in a general circulation newspaper in the district. Notice must be published not more than 14 days not less than 8 days prior to date of the meeting (ORS 294.401(1)).

A SUGGESTED FORM FOR THE NOTICE:

NOTICE IS HEREBY GIVEN, pursuant to ORS 294.401, that a meeting of the Budget Committee of _____ School District No. _____ of _____ day of _____, 19____ at _____ O'clock for the purpose of receiving the budget document of said district for the fiscal year 19____-19____.

This is a public meeting where deliberations of the Budget Committee will take place, and any person may appear and discuss proposed programs with the Budget Committee at that time. A copy of the budget document will be available at _____ (address of the school district administration office) at the time of the meeting.

_____
(Name of the Budget Officer)

* * * * * * *

Prior to the following meeting

New and continuing members of the board and budget committee members may wish to review responsibilities and procedures of the budget committee. This is optional.

On or about December 27

1. This is the first presentation of the annual budget, unless it has become necessary to change due to delay in reaching decisions through collective bargaining or for other reasons. In this case, a later date must be set and formal notice provided.

2. The budget presentation should include:

   a. Elect a chairperson, a vice chairperson, if needed, and a secretary.

   b. Presentation of the budget message by the executive officer, usually the superintendent.

   c. Presentation of the budget document by the budget officer, usually the superintendent or business manager.

   d. Explanation of budget contents and response to questions.

   e. Opportunity to hear from the audience regarding district programs and fiscal plans.

   f. The dates of subsequent meetings, if any are needed, and notice to the public that these continue to be open meetings to which public is invited. New coverage should be provided, if possible.

   g. Announcement that copies of the budget are available and where they are available.

h. Adoption of the budget, either at this meeting or a later one and referral of the budget to the school board.

i. Provision that the official minutes of the actions of the budget committee be placed in the records of the district.

* * * * * * *

January

By the end of the first week, the process of mediation, if used, should be completed. Should agreement not be reached, the ERB should be notified that factfinding will be initiated, unless both parties now agree to go to binding arbitration. If factfinding is used, the board and staff representatives may select their own factfinder or otherwise seek help from the conciliation service division, ERB. The board will want to carefully review the progress that is being made and be prepared to modify these timelines as local conditions may require.

Reports due

1. These reports are due the Oregon Department of Education by January 10:

   a. Form 3200/3200A - Pupil Personnel Accounting Report - quarterly.

   b. Form 3201 - Resident ADM in Part-time and Special Programs - semiannual.

   c. Form 3202 - Basic School Support Fund Report of Nonresident Pupils - semiannual.

   d. Form 3206 - High School Dropout Report Form - quarterly.

2. This report is due at Oregon Department of Education by January 15:

   a. Form 3203 - District Report of Resident Enrollment by County Lines - for quarter ending December 31.

Meeting

1. Review personnel files for those staff members whose status is insecure. This may require an executive session. See Model policies Section 3600, 4660, pages 37-41. Action should occur at this time if possible.

2. Review the budget calendar as developed in August to determine if there is need for any change.

January 26 — Target date for approval of budget by Budget Committee.

Other activities — Gather and prepare data for report due February 1. See following details.

* * * * * * *

February

Report	Prepare and forward by February 1 to the Oregon Department of Education: Form 3198 - Estimate of Pupil Membership and Operating Expenses in Special Education Programs.
On or about Feb. 2	The first publication of the NOTICE OF SCHOOL BUDGET HEARING with the summarized budget should appear no more than 25 nor less than 15 days prior to the hearing. The budget may be published in conventional form (that used by the district in prior years), or it may appear as a program/activity budget accompanied by narrative descriptive statements. See Manual, page 10. Notices should be posted according to legal requirements in the places commonly used by the district. A sample of publication materials may be found in Manual, pages 142-144. (ORS 294.421)
On or by Feb. 7	Deadline for notifying election officer of the date (April 4, 1978), of regular election of board members, ORS 259.070; 259.080; 259.240; 259.260. (This notification is to be made a minimum of 55 days prior to the date of the election of board members.) The notice shall contain the date of the election, board positions to be voted upon, last filing date for candidates and designation of newspaper. ORS 259.090. Election officer shall publish a notice in the next available issue of the designated newspaper. ORS 259.090.
By the end of the first week	The process of factfinding and negotiations should be completed by this time. If agreement is not reached, the process for continued negotiations should be carefully developed. It may be necessary to reconsider the dates and actions as outlined in the budget calendar and the date of the budget hearing.
On or about Feb. 9	The second publication of the NOTICE OF SCHOOL BUDGET HEARING should appear not more than 14 days or less that 8 days prior to hearing. The summarized budget does not have to accompany this published notice; however, the notice must state the name and date of the newspaper which contained the published budget summary. A sample of this notice appears on page 101 of the Manual. (ORS 294.421)

Meeting

1. The work of the budget committee should be completed by this date, adopted by formal action of the committee and presented to the school board for action.

   a. The school board should formally adopt the budget.

   b. The date for publication of the budget and legal budget hearing should be set or reaffirmed.

   c. The date of the vote on the budget should be set or reaffirmed.

   NOTE: School districts in Wheeler, Grant, Harney and Wallowa counties are governed by additional budget procedures outlined on page 12 of the Manual.

2. Personnel files should be reviewed by the superintendent and the board in preparation for personnel recommendations in March. This may be conducted in a properly called executive session.

Feb. 23

1. This is the hearing on the budget as approved by the budget committee and as presented in the local newspaper (ORS 294.430).

   a. The budget hearing should be held prior to the date on which the election officer must be given the 35-day advance notification of the election. See February 27.

   b. This is a public, open meeting, called to consider the budget and the public has the opportunity to raise questions.

   c. The budget hearing should be formally closed when all activity is concluded.

2. The board continues in session, following the special order of business.

   a. Formal action should be taken to approve the budget, unless the discussion calls for some adjustment.

   b. Following the public hearing, the board may determine that the amount to be voted on should be changed as a result of testimony presented at the budget hearing. The amount of the tax levy in the published budget may not be increased without a republication and another hearing.

Feb. 27

Deadline for school board candidates to file certification of nomination. (35 days before date of election) (ORS 259.070).

Deadline for notifying election officers of the date (April 4) of levy election. This notice shall contain a certificate stating date of election, ballot title, statement of purpose, brief description of each matter to be voted upon, and designation of newspaper for publishing notices (ORS 259.090).

NOTE: A district may delay this election until the primary election date, May 23, 1978. See page 17, April 12, in details.

Election officer shall publish a notice in the next available issue of the designated newspaper.

Other activities

Gather and prepare data for reports due March 1. See following details.

* * * * *

March

Reports due

Forward to the Oregon Department of Education by March 1:

1. Form 3190 - Estimate of Attendance of Dependent Students from Child-Caring Agencies.

2. Form 3191 - Preliminary Certification of Child-Caring Facility for Dependent Children.

March 6 — Deadline for receipt of Basic School Support Fund estimate from the State Superintendent of Public Instruction. (ORS 327.094)

Meeting — The board should act, no later than this regular meeting, on the election (renewal/nonrenewal) of current probationary teachers for employment the next school year.

1. The action should be based on the recommendations of the superintendent.

2. There should be a review of the procedure for informing all probationary teachers of the action on their cases and a review of the form of the communication.

3. It is required that all probationary teachers be informed of the action; some districts may choose to also let permanent teachers know of their status by this same date.

4. The board minutes should include a list of the names of all certificated personnel and actions related to them. (NOTE: This record should apply for all other meetings involving some form of personnel action.)

On or before March 15 — All probationary employees should be notified of their status for the next year. Those not to be reemployed must be informed by registered mail and/or by hand delivery before a witness by this date. A person not receiving a notice on non-employment is automatically continued in employment for the following year. (ORS 342.513)

On or about March 23 or 30 — Election officer shall publish a facsimile, except as to size, of the sample ballot, a list of polling places and the hours the polls are to be open. (Not more than 15 days prior to nor later than the date of election. (ORS 259.100 (4) as amended by Chapter 301. OL 77.)

Other activities — Gather and prepare data required for reports due April 10. See following details.

* * * * *

April

1. April 1 is the deadline by which probationary certificated personnel should inform the board whether they accept or reject the offer of contract renewal. (ORS 342.513)

2. By April 1, make provisions for possible changes in staff representation for collective bargaining purposes if such changes were not carried out in the past twelve months. Petitions will be accepted from April 1 to May 1 for an election for exclusive representation of employees. If a petition is received, contact the Employment Relations Board.

Election, first Tuesday, April 4 — District election for new board member(s) and for approval of the proposed tax levy outside the six percent limitation. Polls may be open from 2 p.m. to 8 p.m. or from 8 a.m. to 8 p.m. (ORS 250.345) (See April 12, for other option.)

By April 10 — Complete and forward forms to the Oregon Department of Education:

1. Form 3200/3200A - Pupil Personnel Accounting Report - quarterly.
2. Form 3206 - High School Dropout Report Form - quarterly.

Meeting

1. Review teacher contracts for teacher acceptance or rejection of renewals.
2. Status reports on Equal Employment Opportunity and Equal Educational Opportunity programs.

April 12 — Deadline for notifying election officer the date of the tax base election if the primary election date (May 23, 1978), is selected to meet the requirement of House Bill 3156. The notice shall contain a certificate stating the date of the election, ballot title, explanation of the measure, the amount of the current tax base expressed in dollars and cents the amount of the tax base to be submitted to the voters, and the designation of the newspaper for publishing notices. (ORS 259.090; 310.402)

NOTE: Districts opting not to have a tax base election on the primary election date must submit to the electorate a tax base measure on the general election date - November 7, 1978. The tax base, if approved at the general election, would become effective in fiscal year 1979-80.

April 14 — Date by which district shall receive abstract of votes for April 4 election from County Clerk (ORS 259.200).

April 19 — Date by which the district meets and record in the minutes a report of the April 4 election results obtained from the elections officer, and the decision of the voters as to board members elected and the tax levy (ORS 259.200). (If budget does not pass, see Manual, page 178-181 for procedures.)

1. Should the tax levy fail to pass, the board may now have reviewed the budget and be ready to adopt a new one. The board should set the date for referral to the people and inform the county elections officer of the new election. (Note the Calendar on page 21.)
2. The board may wish at this time to adopt the budget formally, make the appropriations and declare the tax levy if the budget was approved. See Manual, page 15.
3. Formal action should be taken to approve or reaffirm the district salary schedules and to provide for contracts or other procedures for assigning and informing certificated staff of individual salaries for the next fiscal year, as appropriate to collective bargaining status.

4. The list of high school graduated may be approved if appropriate.

Other activities — Gather and start summaries of end-of-year reports. See July.

* * * *

May

As needed — Review status of collective bargaining process if needed.

Other activities — Complete and forward the following reports to the Oregon Department of Education, after approval by voters and formal action by the board. If the budget was not approved by the voters at the April election, these reports should be deferred until approval is obtained, with the exception of Form 3128 which should be forwarded after each budget election.

1. Form 3128 - Election Report - School District Financial Election Date.
2. Form 3101-3114 - School District Budget.
3. Form 3210 - School District Program Financial Accounting Summary (Budget) for the following year.
4. Form 3188 - IED Tax Levy and Apportionment Schedule.

May 23 — Tax Base Election. Statewide primary election (ORS 310.402) using procedures outlined above. Other activities include the continued gathering data and preparing end-of year reports. See July.

* * * *

June

Meeting — Complete the following action, if necessary. Enact resolutions adopting the budget, making the appropriations and declaring the tax levy. At the time the budget is adopted, expenditures in each fund of the budget may be increased up to 10 percent above that in the published budget provided that the tax levy of the published budget is not increased. To exceed either of these restrictions would require republication of the budget and another public hearing. Sample resolutions appear on page 15 of the Manual.

Other activites — Complete all end-of-year reports due July 1. See following.

June 30 — June 30 is the expiration date of the collective bargaining agreements unless part or all of the agreements continued for more than one year, or another date was set as shown in the approved agreements.

* * * *

July

July 1

1. July 1 is the start of the district fiscal year and is the effective date for operation of the new budget, if or when one is approved. It is also the date for implementation of agreements reached under collective bargaining, unless other dates have been agreed upon in writing.

2. The following reports should be forwarded prior to this date to the Oregon Department of Education:

   a. Form 3044 - Year-Round School Application for Optional First-Quarter Basic School Support Fund Payment - where such programs are in operation.

   b. Form 3253 - Report of ADM Changes in District Organization.

   c. Form 3254 - Report on Changes in District Organization.

By July 10

3. Reports due to the Oregon Department of Education by July 10:

   a. Form 3200/3200A - Pupil Personnel Accounting Report - quarterly.

   b. Form 3201 - Resident ADM in Part-Time and Special Programs - semiannual.

   c. Form 3202 - Basic School Support Fund Report of Non-Resident Pupils - semiannual.

   d. Form 3206 - High School Dropout Report Form - quarterly.

   e. Form 3263 - Report of Membership and Attendance in Private and Parochial Schools in Oregon - semiannual.

4. Reports due the Oregon Department of Education by July 15:

   a. Form 3193 - Report of Attendance of Dependent Students from Child-Caring Agencies.

   b. Form 3194 - Certification by Child-Caring Facility for Dependent Children.

5. The tax levy shall be certified to the county assessor, or when voters approve the levy.

As soon as possible but no later than Sept. 15

6. Form 3210 - School District Program Financial Accounting Summary (Pre-Audit) for prior year.

July 15 The tax levy should be certified to the county assessor, or as soon as possible after this date.

* * * *

August 15 Deadline for State Superintendent of Public Instruction to certify to county assessors the amount, if any, of tax offset to be subtracted from local district tax levy. (HB 3209; HB 5059, 1977 Legislature)

GUIDELINES FOR ACTION

The general election laws of Oregon apply to elections of school districts and community colleges. Districts are responsible for election expenses.

The elections of school districts shall be held on the days listed below (except for recall elections). (ORS 259.260, as amended.)

1.	Second Tuesday in January	January 10, 1978
2.	Second Tuesday in March	March 14, 1978
3.	First Tuesday in April	April 4, 1978 (regular district election)
4.	Fourth Tuesday in May	May 23, 1978
5.	Last Tuesday in June	June 27, 1978
6.	Second Tuesday in August	August 8, 1978
7.	Third Tuesday in September	September 19, 1978
8.	First Tuesday after the first Monday in November	November 7, 1978

NOTE: HB 2660, enacted by the 1977 Legislative Session, authorizes the districts to elect board members at its first levy election. However, the statewide primary election date (4th Tuesday in May, even-numbered years) shall not be used to elect board members. Since board members must take office on July 1, the effect of this legislative act is to provide four election dates in odd-numbered years and three election dates in even-numbered years on which election of director(s) and a levy election may be jointly held.

Oregon law does not mandate that the levy election follow the budget preparation process. The levy election may precede the preparation of the budget, or it may occur at any point during the budget development process.

* * * *

The minutes of district school board meetings should list the names of all personnel contracts and agreements involving certificated employees, interns or others, including supplemental contracts for additional services. These matters may be discussed in executive session, if properly called, but formal action is required and must take place in a properly called open session.

* * * *

A summary of the important dates for the guidance of the district officials and county elections officer is presented on page 21. It will be noted that the dates shown are for the school year 1977-78. Appropriate corrections will permit use of this information in subsequent years.

* * * *

Samples of a task-oriented yearly worksheet from two Oregon districts are shown on pages 21-22. Other districts may find these useful with appropriate changes in dates to meet local needs.

CALENDAR FOR MEETING REQUIREMENTS OF OREGON BUDGET LAW - FOR 1977-78

Election Date	Inform County Clerk of Election, by _____ or as directed.	Public Notice for Budget Committee Meeting Prior to Date Set by Board:	Public Notice for Budget Hearing Prior to Date Set by Board:	First Notice of Budget Election Between:	Facsimile of Ballot Between:
January 2nd Tuesday 1/10/78	12/5/77	Not More Than 25 Nor Less Than 14 Days	First Publication Not More Than 15 Days Second Publication Not More Than 14 Days Nor Less Than 8 Days	12/8 to 12/14	12/26 to 1/10
March 2nd Tuesday 3/14/78	2/6/78			2/9 to 2/15	2/27 to 3/14
April 1st Tuesday 4/4/78	2/27/78			3/2 to 3/8	3/20 to 4/4
May 4th Tuesday 5/23/78	4/17/78			4/20 to 4/26	5/8 to 5/23
June Last Tuesday 6/27/78	5/22/78			5/25 to 5/31	6/12 to 6/27
August 2nd Tuesday 8/8/78	7/3/78			7/6 to 7/12	7/24 to 8/8
September 3rd Tuesday 9/19/78	8/14/78			8/17 to 8/23	9/4 to 9/19
November 1st Tuesday after 1st Mon. 11/7/77	10/2/78			10/5 to 10/11	10/23 to 11/7

SCHOOL BOARD TIMELINE

	July	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June
CAPITAL IMPROVEMENTS.		-Consider priorities	-Consider priorities	(Special requirements for board action will result from decisions made regarding priorities.)								
NORMAL BIDS	-Milk products -Fuel oil (Emergency plan)	-Consider site acquisition									-Roofing -Black-topping	-Other summer maintenance as needed
NEGOTIATIONS		-Consider selection of negotiator -Consider subcommittee	-Brief admin. staff on contract admin. -OSBA negotiations workshop -Consider goals and methods		Classified employees open negotiations	Negotiations	Negotiations	Negotiations	Negotiations			
REGULAR BUSINESS	-1st payment new salary & fringe to 12 mo. employees -Organize board -Adopt budget -Make appropriations -Levy taxes -Borrow funds	-Contract Administrator -Fringe benefit sign-up by employees -Citizens Advisory -Apt. Ed. Council -Set tuition -Apmt of Budget Committee	-1st payment new salary & fringe to 10 mo. employees -Student member joins board -Apt. class committee -Apt. certif. committee	-Employ auditors -Normal business	OSBA Conf., Hilton Hotel	-Brief board on proposals -Normal business	-IED resolutions -Normal business	-Board photo -Normal business -Consider date for budget election	To be completed -Review staff (Notice due by Mar. 15)		Oath to new board members Adopt school calendar	-Designate depositors -Clerk's bond
SPECIAL REPORTS	-Select attorney -Student insurance -Committee Apmts. -Clerk's bond	-Opening workshop -Preliminary affirmative action -Discipline -Public relations	-School opening report -Enrollment & staff	-Reminder: OSEA Conf. in Nov. -Apmts. to classified Employees Relations Council -Sept. 30 report on enrollment & class size	-Reminder: -Report on curriculum		-Report on food seminars -Report on curriculum	-Report on commencement -Forecasting report on curriculum	-Employ admin. & exec. -Report on budget campaign -Report on curriculum	-Budget effort -Curriculum	Report on Special Ed.	-Commencement exercises -Year-end dinner -Report on 5-yr. reading program
BUDGET PREPARATION		-Board policy -Consider budget timetable	-Affirmative action policy, cont'd. -Discipline, cont'd.			-Snow & Ice Report -Schools & dept. prepare priorities		Student body funds report	-Budget r[illegible]tings	annual elect. -Budget elec.		-Public hearing
ELECTION DATES		-HS activity budget approval -2nd Tuesday in August	-3rd Tuesday in September		-1st Tues. after 1st Monday in November	First run on estimate	-Notice to press -2nd Tues. in Jan.	-Budget message -Notice to tax Super. & Cons. Comm. -Budget hearing	-2nd Tuesday in Mar.	-1st Tues. annual elect. -Board members -Budget	4th Tuesday in May	-Last Tuesday in June